

## **Attachment B**

### ***Statement of Interest Statewide Long-Term Care Reform***

#### **THE MANAGEMENT GROUP, INC. (TMG)**

##### **Organization Name(s):**

The Management Group, Inc.

##### **Contact Person and Contact Person's Organization:**

Peter J. Tropman and Virginia L. Graves, Principals  
The Management Group, One South Pinckney Street, Suite 320, Madison WI 53703  
Voice: 608-255-6441; Fax: 608-255-0898; Email: [Peter.Tropman@tmg-wis.com](mailto:Peter.Tropman@tmg-wis.com);  
[Virginia.Graves@tmg-wis.com](mailto:Virginia.Graves@tmg-wis.com)

##### **Brief Description of Organization:**

TMG is a consulting, staffing and educational services firm that has 17 years of experience in the field of community based long-term care and managed care. Working with long-term care organizations as its primary focus since its inception in 1988, TMG has helped build, manage, and improve quality care systems for people with chronic care needs.

As part of its mission, the company has also focused on the design and implementation of managed care approaches for long-term care and SSI populations, design and implementation of quality management systems for long-term care, and the use of data and information to effectively manage long-term care organizations. In addition, TMG has provided expertise in quality assessment and performance improvement, integrated managed care program development, regulatory compliance, case management and direct care staff training and service delivery system design.

In Wisconsin and nationally TMG has worked with federal, state, and local governments, insurance companies, managed care organizations (MCO), and provider organizations. It has worked with all major Wisconsin long-term care programs, including Partnership, Family Care, the Community Options Waiver Program, the Community Integration Program and PACE. Recently TMG has been actively involved in the design of SSI Managed Care approaches in Dane and La Crosse Counties.

TMG has a multi-disciplinary staff of professional consultants and analysts complemented by a set of organizational partners with backgrounds in all aspects of health and long-term care policy, service delivery, program management, managed care, and quality improvement. They represent a 'best and brightest; a team with knowledge and experience in program design, policy development, social work, managed care, insurance, research, data and utilization analysis, and in training. They are capable of providing the planning, program development and ongoing operational support for long-term care organizations engaged in developing the kind of systems called for in this RFI/RFP and Attachment A.

A brief description of these individuals and organizations along with their areas of expertise and experience follows:

### *TMG Principals, Senior Consultants and Staff*

- Virginia L. Graves: Principal - Managed care systems development and integrated service models; network development and contracting; Project management, facilitation, and leadership.
- Marci Katz: Chief Financial Officer - Financial management system, administrative systems and operations, contract management, mental health program operations.
- Tom Lawless: Senior Consultant - Risk analysis and risk management systems, performance profiling, cost neutrality analysis, financial performance analysis/projections.
- Gail Nordheim: Senior Consultant - Quality outcome and performance improvement systems design, development, and implementation, self-direction and determination program design, integrated consumer center care management.
- Heidi Pankoke: Senior Consultant - Strategic planning and development; policy, program and operations analysis, project management and leadership.
- Lynn Retan: Director of Regulatory and Compliance Services - Managed care licensure and compliance, Medicaid and Medicare regulatory compliance analysis, certification, and reporting
- Staff Consultants:
  - Phil Davis: Direct care workforce recruitment, retention, and competency-based training.
  - Shanna Jensen: Long-term and mental health quality systems, self-direction and self-determination.
  - Jan Ham: Alzheimer's services, direct care worker competency-based training systems.
  - Dan Hirst: Managed care and Medicaid financial analysis and reporting, encounter data analysis.
- Peter Tropman: Principal – Long-term care system design, Quality Outcome and Performance Improvement Systems; Aging and Disability Resource Center development.
- Dave Verban - Senior Research Analyst - Performance profiling, residential rate setting, self-direction and determination program design, information system design and operation.

### *Partnering Consultants and Organizations:*

- Gerry Born: Lori Knapp Inc. - Comprehensive long-term care and human services management consultation and strategic planning and development, developmental disabilities program development, nursing home downsizing, residential rate setting.
- The Center for Self-Determination – self-determination systems design and development
- Dennis Harkins: Independent Contractor - Self-determination program models and delivery system design, human systems and outcomes, developer of qualitative consumer outcome and program practice review tools and related QI processes.
- Lori Knapp, Inc.: Provider of a comprehensive array of direct care and support services for the elderly, physically disabled and developmentally disabled.
- Maggie McCollugh: Independent Contractor - Community long-term care systems development and operations, Family Care Program development and operations.
- Oregon Technical Assistance Corporation: Jean Tuller - Self-directed service model development, implementation, and training in Medicaid.
- Tim Otis: Independent Consultant - Mental health/substance abuse (MH/SA) service systems, operations and clinical practice improvement. Retired Executive Mental Health Center of Dane County.
- Meryl Price: Independent Contractor - Medicaid and Medicare managed care systems design and implementation, public-private collaborative development.
- Burton Wagner: Attorney with Reinhardt et. al - Community and residential long-term care legal services.

### **Interest in Planning and Implementation of Long-Term Care Reform in Wisconsin:**

*Assisting organizations to build, manage, and improve quality care systems for persons with chronic health care conditions* is TMG's mission. This mission directs the full focus of our organization to the issue of long-term care reform. As we see it, when you say, 'TMG' you say, 'Long-term care reform.'

TMG is absolutely committed to the development of an integrated, cost-effective model of managed long-term care in which all eligible citizens are surrounded by a full array of long-term care, health care, and MH/SA services which provide consumers access to the services they choose in the place that they call home. This vision defines our interest in long-term care reform in three areas of focus through which TMG seeks to be a:

*Consulting Partner to Local/Regional Managed Care Collaboratives:* TMG is interested in being a ‘partner in reform’ at the local/regional and statewide levels. As a full service consulting and service organization, TMG is interested in both the near-term and the long-term—helping new organizations/collaboratives develop, implement and then, successfully and cost-effectively, operate integrated, managed, high quality delivery systems. As a provider of specialized expertise and out-sourced services supportive of managed care, care management, and program administration, operations and quality improvement, TMG can support regional MCOs to focus on the job of providing the best possible services to members. TMG is interested in being the consulting partner with multiple non-competing MCOs across the state by providing a core set of services tailored to meet local needs. The resulting concentration of expertise and sharing of experience will allow for a dramatic increase in efficiency of effort, and focused and consistent attention to the goals of reform. As described in the next section TMG is already working statewide with local collaboratives, coalitions, and MCO’s.

*A Partner in Quality Improvement Systems Development:* The move to managed care will result in a dramatic shift in both the nature and the locus of responsibility for quality improvement. Local entities will be responsible for the implementation of quality outcome and performance improvement systems. TMG, through its historic work on the RESPECT Values framework and related outcome assessment processes, its development of county-specific performance profiles for COP, the CIP/COP Waiver, and Mental Health programs, and its current work on the Quality Close to Home and Child Welfare Continuous Quality Improvement Projects, understands both the art and science of quality improvement. Our work on the development and implementation of the Quality Service Review Tool and CQI process has demonstrated to us that it is possible to create improved ‘technologies’ that understand and amplify the voice of the consumer in combination with system performance measurement and front line staff/manager training. TMG is interested in working in partnership with state and local/regional programs to develop and implement such a qualitative review process. It would dramatically heighten the impact and effectiveness of state and local/regional QI efforts.

*Partner in Statewide Capacity Development* - TMG’s interest has also prompted us to invest in and support the development of two organizations designed to support the long-term care reform at a statewide level. These organizations are designed to address critical resource gaps.

- Community Care In Action: TMG is a founding partner in Community Care In Action, LLC (CCIA), which has been created with a two-fold mission: The first mission of CCIA will be to meet the need for a competent, value-driven organization able to build and operate managed care programs for persons with developmental disabilities. There currently are no private organizations operating in Wisconsin capable of developing/operating values-based, person-centered managed care programs for the developmentally disabled. The second mission will be to work with DHFS and local parties (including counties and providers) to develop comprehensive managed care approaches for geographic areas not covered or served by existing or developing MCOs. In these areas CCIA would be capable of totally managing the long-term care program. It would work with the counties involved, their staff and provider networks, and a managed care administrative service organization to create a managed care program consistent with the stated goals. CCIA would, at a minimum, assume the risk and manage the care for the developmentally disabled consumers. (Community Care In Action is described in detail in a separate RFI and RFP.)
- The CareWorks: The CareWorks is incorporated as a non-profit Wisconsin corporation with a mission to advance the development, implementation, and operation of local long-term care

systems by supporting their ability to offer people with long-term care and health care needs expanded access to choice-driven, integrated, cost efficient, well-run managed care programs. TMG has invested cash and in-kind resources in the incorporation and development of The CareWorks. The CareWorks is designed to draw from the staff and expertise of model programs such as the Wisconsin Partnership Program and Family Care; from the consultative and technical expertise gained by having direct experience in ‘managed’ community-based long-term care; and from the training, research and educational capacities of educators affiliated with the state’s universities. (The CareWorks is described in detail in a separate RFI.)

### **Geographic Area of Interest:**

TMG, in cooperation with Consulting Associate Gerry Born, has been actively working with public and private collaboratives around the state as a Consulting Partner, providing consultation, facilitation, and planning. TMG has worked or consulted with the following organizations:

- West Central Wisconsin-Care Management Collaborative
- North West Long Term Care Options
- West Central Consortium for Long-Term Support and Health Care Reform
- Family Partnership - Care Management Coalition
- Dane County
- South East Wisconsin - Care Management Organization
- South Western Wisconsin
- North East Region
- Rock County
- The Wisconsin Council on Developmental Disabilities
- Community Care in Action
- The CareWorks

### **Proposed Scope and Nature of the Program:**

As a consulting partner, TMG offers a full range of products and services to support regional entities and state-level organizations that are providing or planning to deliver long-term care or integrated health, mental health/substance abuse and long-term care managed care services. TMG is able to support these efforts at any stage of an entity’s involvement including:

- Front end planning;
- Program development and implementation; and
- Ongoing operation and service delivery.

TMG employs a staff of long-term care, health care, and managed care professionals with experience in program design, development, implementation, operations, and quality improvement. TMG is able to sub-contract for legal, information systems, training, and other expertise, as needed. TMG’s goal is to work in partnership with our clients to provide the required support on a ‘just-in-time’ and/or ‘as needed’ and/or ongoing basis.

Services offered by TMG include:

***Planning Services:*** Meeting facilitation, preparation of agendas and materials, project management, scheduling, coordination of communication across organizations

***Development Services:*** Strategic planning, identification of new markets, populations, and services, research and selection of partnering organizations, financial proforma’s, service capacity, analysis, research

**Analytical Functions:** Population profiling, capitation and sub-capitation rate development, risk analysis, integration of funding streams, budgeting, enrollment / breakeven analysis modeling.

**Administrative Services:** Standard contracting, regulatory and compliance activities, program certification, information systems needs assessments and development, data warehousing, routine and ad hoc reporting (e.g., analysis of claims data).

**Quality Services:** Quality assurance, quality improvement systems, quality indicator development, performance-based contracting, quantification of program effects, best practice focused training and education.

**Care Management Systems:** Interdisciplinary team practice protocols and competencies, competencies-by-discipline, courses in case management, ethics and boundaries, outcomes, material development, including videos, manuals, seminars, and continuing education materials.

**Direct Care Workforce and Manpower:** Recruitment and retention, fiscal agent systems, competency-based training, competency-based supervision and management systems, quality oversight.

**Self-Direction and Self Determination:** Fiscal agent systems, self-directed support systems, self-determination, individual budgeting systems, service broker training and development.

**Regulation and Compliance:** Provider/CMO/MCO application and certification support, HMO license acquisition support, on-going compliance support, Medicaid, Medicare, commercial insurance.

#### **Other Comments or Information:**

For long-term care in Wisconsin, the next few years hold the promise of being the ‘interesting times’ of which Confucius speaks. TMG already feels blessed to be a part of the process. The response from regional collaborations of counties working in partnership with private providers and managed care organizations has been heartening, remarkable, and truly exciting. For the State, this response offers an incredibly rare opportunity to capitalize on genuine interest in long-term care reform with a relatively limited state-level investment. In virtually all instances, the investment of local resources significantly exceeds the requested funds.

It is also clear that the work involved in moving from vision to reality will be challenging. TMG is prepared for and excited by the challenge. We see it as a rare opportunity to contribute to something that holds the promise of improving the quality of life in Wisconsin. The stewardship of Wisconsin’s long-term care programs and the lives of the citizens entrusted (or waiting to be entrusted) to them is best served by developing the capacity to pursue these reforms with both deliberate speed and prudence of execution—marrying the best of the past with the promise of the future. TMG is deeply interested in being at the fulcrum of this effort, and providing balance, support, and leadership, which flows from expertise and a commitment to serve.